

Query

User Guide



Produced by Telford Development Centre

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Document Revision

Current Revision

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Rev	Date	Revision Description
0.1	18/11/03	Initial pre-release
1.0	16/01/2004	First release

Query Module

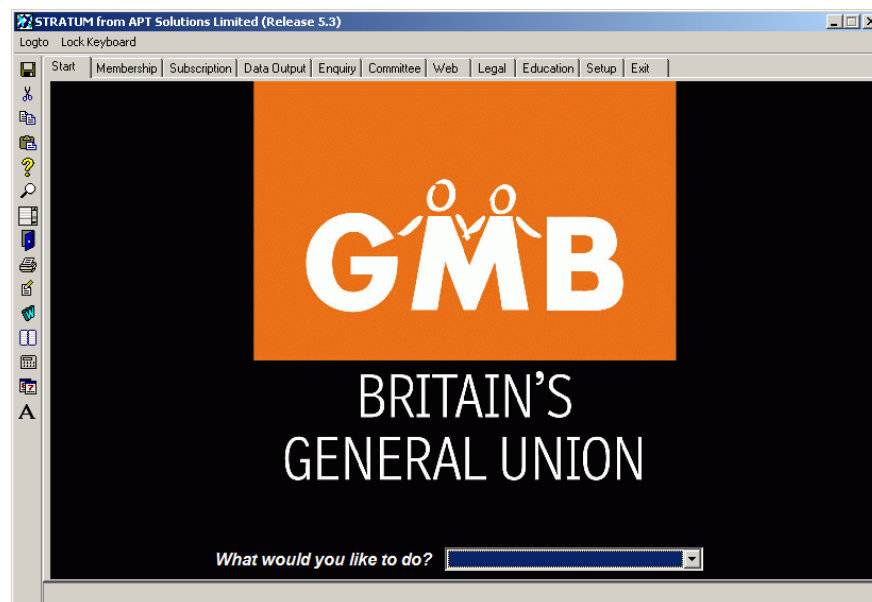
Introduction

The Query module is designed to assist the user to retrieve information from the membership database. When the required data is retrieved it can be displayed on the user's screen or exported from the system using a variety of media. The data can be used during a general enquiry, statistical analysis and for ad hoc or scheduled reporting.

The Query module can also be used as means of efficiently mass selecting members to receive correspondence and emails or have amendments carried out to their records.

This guide takes the user through the basic Query functions using simple selection criteria. The more complex areas of database interrogation and list management are covered in a different more advanced guide.

The system Query system is accessed from within the Data Output tab located on the system's main menu.



GMB System main menu

Note: This guide covers the basic aspects of the Query module and uses the Member data set for examples. However the principles and procedures are valid for each GMB data set.

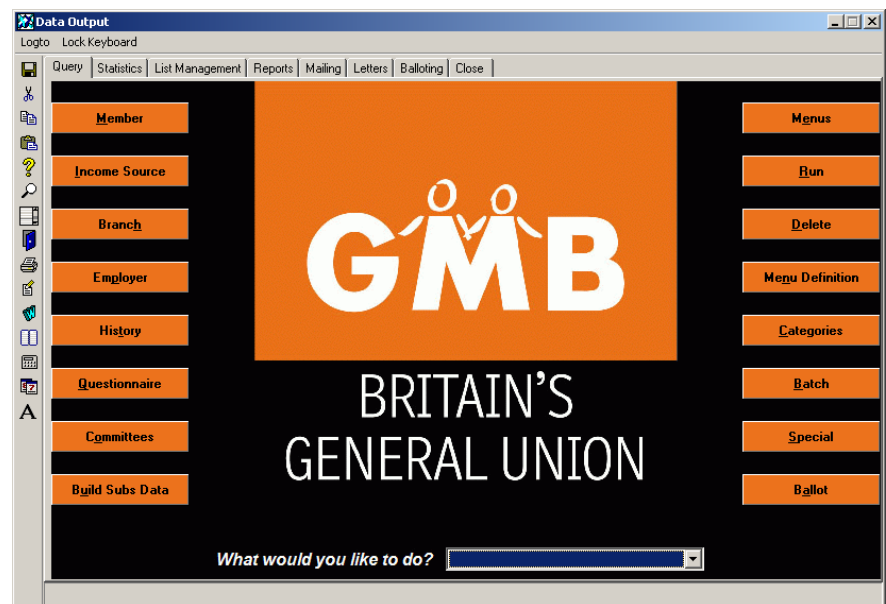
Running a Query

When the Data Output tab has been selected the user will be presented with the Query main menu.

The membership system has different areas that contain their own type of information. These areas are called data sets or data files. Some data may be kept in more than one data file and other data may only be available in one data file. Therefore it is very important that the user selects the correct data set to interrogate. Typical examples of data sets available to interrogate are member, branch, income source, employer or committee records.

Also during the query process the user must correctly define which data fields to interrogate. Conceptually every item of data that is recorded on the system is available for interrogation. However the user needs to know the correct name of the data field in order that they can input it into the query selection. Therefore it is imperative that the required Query fields are available for selection, and are given descriptions that users can associate with.

The Query module uses defined selection criteria to select records within the chosen data set. When the records have been selected the user can define which information is to be displayed from the record, and the order it is to be displayed.



Query main menu.

Note: When unsure of what to input, hover the cursor over the data field in question to display the system's intuitive help.

Essentially any data that is viewable within a branch record can be interrogated by the Query system. If the query fields are not available please contact the GMB system administrator.

Running a Query More Than Once

The system provides the facility to save a query selection for future use. This useful feature enables queries to be run by users that have not had formal Query training. Also complex interrogations of the database only need to be defined once, after which, they can be re-run when required.

When a query is saved the system provides security to prevent unauthorised users running the query and/or amending the selection criteria. For further information please refer to “Running a Saved Query” on page 24.

Exporting the Query Results

When a query has been correctly defined it will select records based on the interrogation criteria. The data available for export will also be defined by the user and can be output to a variety of media.

The most common destinations to export the query results are to:

1. Screen
2. Acrobat. PDF files
3. Excel
4. Word & Word Mailmerge
5. Host or Local printer
6. ASCII files
7. HTML

The query can be limited to providing a sample of results, the size of which can be decided by the user. For large amounts of data this will save time while the select criteria are being refined. The exported data can also be either shown in detail or summarised depending on what the user requires.

Query Types

When the data set has been selected a screen will be displayed that required the user to define the selection criteria and output properties. Before the user begins the query definition they must select the Query Type. The available types and there purpose will vary between data sets. For explanation purposes the member data set Query types are listed here:

Standard Query

All queries are based on this Standard Query. It is the most used Query Type for interrogating the database and is used for analysis and reporting. All users should be familiar with creating a Standard Query before attempting one of the other types.

A procedural explanation is covered in “Standard Query” on page 11.

Letter Query

This Query type can be used to quickly add many branches to a Standard Letter Run using selection criteria. A procedural explanation is covered “Letter Query” on page 35.

Label Query

The Query module can be used to produce labels directly to a host or local printer. This method of label production is largely superseded by label production in modern word processor applications. If labels are to be produced directly from the system please contact APT Solutions Support to ensure that labels sizes, and the system print manager, are compatible with the local network. For a procedural explanation please refer to “Label Query” on page 39.

Information on creating a Standard Letter is covered in the Communication User Guide

Email Query

The Query System enables an Email to be sent to those records that are selected. This facility allows the sending of individual or group Emails, and utilises the user's Email client.

The destination email address that is used will depend on how the system is set-up. If Email Types are valid and the data is accurate the user can specify which address to use. If not, the Query will send an email to the address that appears first on the branches main record.

Amend Query

There may be a requirement to amend multiple branch records for the same reason. This Query Type can be used to select branches using user defined criteria and place them in a list. The user can then efficiently enter each record on the list to make an amendment.

Query Data Sets

As discussed earlier in “Running a Query” on page 4, the system can query any data held on the membership system if the appropriate data set is selected.

Query interrogation principles are practically identical in the following data sets and are already covered in “Running a Query” on page 4:

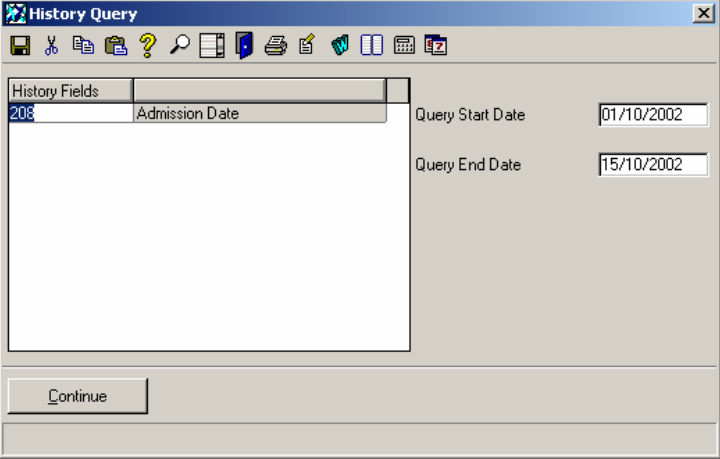
1. Member
2. Income Source
3. Branch
4. Employer

The following Query Types also follow basic Query principles but require a process to be carried out before the query is defined.

History Query

The purpose of the History Query is to enable a user to report and analyse changes made on the membership system to member records. The History Query option, located on the Query main menu, enables the user to run a query to identify all the members’ records where a change has been made to fields specified within a user defined date range.

The system will produce a list of members from the query defined in the History Query screen.



History Query Screen

History Fields

Select F3 in the History Fields column, to select from all of the available fields in a member record. The number displayed with the data field is its data file reference number. One or more data fields can be specified

Query Start Date

Enter the earliest date to identify changes from.

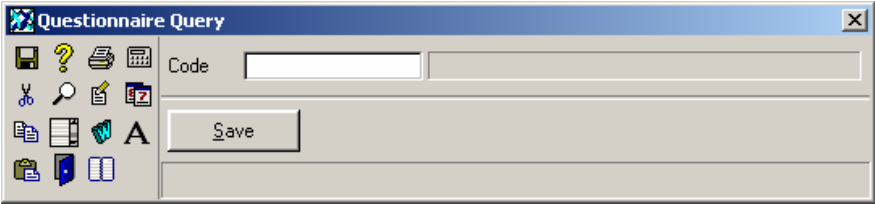
Query End Date

Enter the latest date to identify changes to.

When all of the records have been selected, a standard query can be defined to interrogate the list of members identified by the system. Please refer to “Standard Query” on page 11 for more information.

Questionnaire Query

The system’s Questionnaire facility is designed to enable external data to be imported into the membership system for analysis or updating purposes. This Questionnaire option, located on the Query main menu, enables the user to interrogate the Questionnaire results. When the Questionnaire name has been entered the data can be interrogated using the standard query principles.

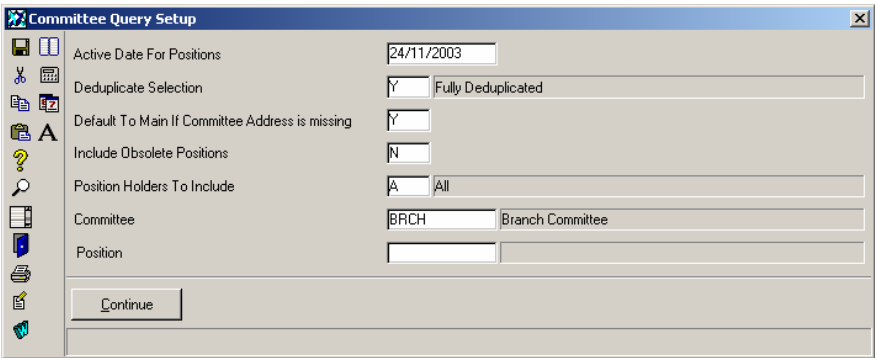


Questionnaire Query Select screen

To query a Questionnaire results, enter its name and select **Save**. Then query the data as described in “Standard Query” on page 11.

Committee Query

The membership system records post holder details within a member’s record but also within a committee data file. The Committee option, located on the Query main menu, is used to output data on the various committee members. It first builds a data file containing the committee member data, and then presents the user with the standard APT Query system that allows the extraction of data from this file. Clicking the Committee option presents the following screen:



Committee Query Setup screen

This screen allows the user to tailor the interrogation to ensure the desired results are obtained.

Active Date of Positions

The field allows the user to specify a date on which use the active position date for the posts. Please note that although the active date is historical, all the other member data will be current. For example a member’s current address will be used for correspondence even if the specified active date was 6 months previous.

Deduplicate Selection

A member may hold a post on more than one committee and more than one post on the same committee. This field allows the user to perform the following de-duplicate options:

- Select **Y** to fully de-duplicate the committee data. This will result in a member appearing only once irrespective to the number of posts they hold and committee they are on.
- select **C** to de-duplicate the same committee only. This still results in a member being included for each committee they are on.

	<ul style="list-style-type: none"> Select N to not de-duplicate at all. This will results in a member appearing once for every post they hold irrespective of committee.
Default to Home if Address Invalid	A specific address can be set for committee related correspondence. If set to Y, and the specified committee address for that member (in the committees setup screen) is blank or invalid, their home address will be used instead. If set to N, then the address is left blank or invalid.
Include Obsolete Positions	The posts that are no longer required by the GMB should be flagged as obsolete. This field can then include them in the query results by entering Y, or exclude them by entering N.
Position Holders to Include	The Position Holders to Include field allows the user to specify the type of position holders that should be included in the Query. The options for this are Full Only (F), Provisional Only (P) or All (A). This field relates to the Status flag from the Amend Position Details screen.
Committee & Position	<p>The two final options, Committee and Position, allow the user to specify a single Committee and Position code to be included in the query. This is a time saving option for interrogating single Committees, as it ignore all the other committee data. The user can specify a Committee and leave Position blank to include all position holders within that Committee, or they can enter a Committee and Position to include a single Position.</p> <p>It is not possible to enter a Position code without a Committee as the system needs to know which Committee the Position relates to. Both fields have their own F3 key lists. The Position selection list only shows the positions valid for the Committee specified in the Committee field.</p> <p>When all of the above options have been set up as required, select Save to build the Query data file. The system will build the data file and present the user with the standard Query Definition screen. The time taken to complete this function is proportional to the number of committee positions involved.</p>

Subscription Query

The Build Subs Data option located on the Query main menu is designed for detailed interrogation of the subscription data recorded on the system. It allows subscription information to be compiled into one file which can be used by the query module. Building one file speeds up the interrogation process and allows the user to carry out queries that they could not carry out in Member query.

As the subscription information held on the system can contain a massive amount of data, a date range must be entered to limit the file size. The time taken to build the file will be proportional to the number of members on the system and the build date range.

When the subscriptions data file is built the user will be presented with a standard query definition screen, please refer to “Standard Query” on page 11.

For advice on whether to query subscription information within the Member data set or the Subscription data set please contact APT Solutions Support.

Note: standard financial reports are available in the Report tab located in the Data Output module.

Batch Query

The Batch option, located on the Query main menu, is to enable the user to batch together previously saved queried and run them consecutively. This facility would normally only be used when exporting the data to file.

Query	Value 1	Value 2	Value 3	Value 4
Surname = Jones - B1	Jones			
Surname = Smith - B1	Smith			

Value 5	Value 6	Value 7	Value 8	File Name
				Jones.txt
				Smith.txt

Save

Query Batch screen

Enter the Saved Queries and enter the values as required. When satisfied select the **Save** option to run the query batch.

Note: using the Batch Query function is an advanced function. Please liaise with APT Support when completing the Query Batch screen.

Special Query

The Special Query option gives the user two options.

Any File
Multi-Value

Anyfile Query

The Anyfile option allows the user to access and interrogate any data file on the system. . This is a facility for advanced query users and should be operated in consultation with APT Solutions Support

Multi-Value

The Multi-Value option enables the user to interrogate multi-value data fields. The most common reason for carrying out a multi-value query is to interrogate received correspondence. This is a facility for advanced query users and should be operated in consultation with APT Solutions Support

Ballot Query

The Ballot Query performs the Ballot selection process for the GMB. For further detail please refer to the separate Ballot user guide.

Standard Query

A typical example of a standard query may be as follows:

“I need to know which of my current active members are over fifty years of age and joined us before 1975. I wish to output this information to an excel spreadsheet and then print it out.”

Defining a Query

Query Type

The first field is labelled Query Type and is normally defaulted to Standard. If not select **Standard** from the drop down menu.

Select from

At Select From you can determine the area of membership you wish to interrogate. You have to decide if you wish to query on current members, members who have lapsed or both. Selecting F3 will produce a list of options to select from.

When a selection is made the cursor will automatically jump to the **Include Members with Invalid Addresses** screen. This field enables you to determine whether to include members on your database that have their address flagged as Invalid within their main record. As correspondence to invalid addresses will be returned, this would normally be set to N for no for queries that are to be used for letters or mailings.

Members

Each membership grade or contact type can be set to be classed as a ‘member’. This field enables the user to define whether members, non-members or all members are to be included.

The next three columns are where the user specifies the selection criteria. The first column determines the component of information by using a Query field. The second and third determine which aspect of the component the Query System will find.

Select (F3)

Each Query field and its description must be setup to be used across departments. For example, enter **AGE** as the component in the Select field.

Note: input the start of the query field description before selecting F3 to limit the displayed list.

Connective

The second element of the line will specify an arithmetical directive for the third element, this is called a Connective. For example, Greater Than, Less Than or Equal To. For example, select the **Greater Than** option to capture records that have query field values in excess of that specified in the Value field.

Value

The Value element, combined with the second element, is the exact information required to be used in the search criteria. For this exercise input **50**.

The system allows several lines of selection criteria to be entered. This would be necessary for very exact and complex queries. For example, in this exercise we will complete the second line as follows:

- Select field – input **“Join.Date”**
‘AND’
- Connective field – input **“Earlier Than”**
‘AND’
- Value Select field – input **“01/01/1975”**

Query Type: Standard

Select from: Active

Members: Members

Include Members With Invalid Addresses

Select	Connective	Value	And/Or
AGE	Greater than	50	AND
JOIN.DATE	Earlier than	1975	AND

Query Definition screen – select fields

In this example each line is added to the other because AND was selected between the lines. This will make the system search for items that meet all the specified criteria. There is the option to use OR in place of AND at the end of a line. If OR is used the system will select records that match either line of the selection criteria that the OR is between.

For example, if OR and not AND had been used in the above example, the system would select all those who were older than 50 years of age ignoring when they joined, and all those who joined before 1st January 1975 ignoring what age they were.

There are a multitude of input options that will vary between data sets and queries. As the user becomes more familiar with the query system they will begin to input multiple entries as shown below.

Note: the availability of AND or OR options is dependent on your parameter set-up. If in doubt contact your System Administrator.

The screenshot shows a 'Query' window with a toolbar at the top. Below the toolbar, there are several dropdown menus and checkboxes. The 'Query Type' is set to 'Standard'. The 'Select from' dropdown is set to 'Every Record', and the 'Members' dropdown is set to 'Members'. There is a checkbox labeled 'Include Members With Invalid Addresses' which is unchecked. Below these settings is a table with four columns: 'Select', 'Connective', 'Value', and 'And/Or'. The table contains two rows of data.

Select	Connective	Value	And/Or
SURNAME	Equal to	Smith, Jones	AND
AGE	Equal to	50, 51, 59, 60, 61	AND

Query Definition screen – select fields

When making multiple entries ensure a comma is placed between each query so the system can identify the different inputs. When commas are input between entries the system treats them as 'OR'. Therefore the input values are 50 or 51 or 59 or 60 or 61 and Jones or Smith. The system will query all members who have a surname of Jones or Smith and are 50 or 51 or 59 or 60 or 61.

Wild Card Entries

A useful feature is the use of 'wild card' entries to find or query information when the user is not completely sure of the value. There are three wild card functions within the system '[' ']' and '^'. The uses of these are as follows:

1. '[mith' searches the database for values that end in *mith*, for example, surnames ending with 'mith', such as Smith.
2. 'Jone]' searches the database for values that begin with *Jone*, for example, surnames beginning with 'Jone', such as Jones.
3. 'Sm^th' searches the database for values that begin with *Sm*, end in *th* and have one missing character between them, for example surnames, such as Smith, Smoth, Smth etc.

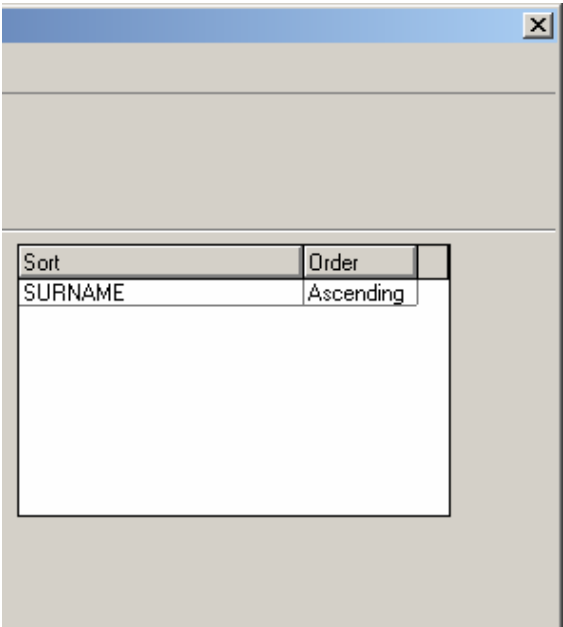
Note: the Query system can not find or retrieve any values that contain a comma. Therefore if data has been input into the member record incorrectly i.e. Smi,th it will not be found. The system parameters should be set-up to prevent any data containing commas from being entered on to a member's record.

Order and Display

When the query is defined the system knows to select the member records that fall within the specified criteria. The user can then identify how they want the system to sort the records and what information from within the records they want to display. The selected records can be sorted by any data item that has a query field set-up, in ascending or descending order.

Sort and Order Fields

To arrange the selected records in a particular order, complete the Sort fields as appropriate. The retrieved information can be sorted by any available Query field.



Query Definition Screen - display fields

Sort (F3)

From the available query fields enter the data with which to sort the query results.

For example, select **Join.Date** in the top field and **AGE** in the second row. The system will first sort by the Join.Date field and then by the AGE field. That is, the results will show members in Join.Date order, and for each Join.Date, the members will then be ordered by their AGE.

Order (F3)

In the order fields enter whether the Sort Order is to be in ascending or descending order.

Note: it is recommended practice to always display the query fields that are used for sorting. Similarly if results are to be totalled, and have breaks applied, the query fields must be sorted correctly.

Display Information

Display		Break	Total	
MEMBER.NUMBER	13	N	N	Text
SURNAME	20	N	N	Text
AGE	3	N	N	Number
JOIN.DATE	15	N	N	Date

Report Width 54

Accept Clear Special Select Updates Save Query

Query Definition Screen - display fields

Display

The **Display** fields allow the user to decide what information they require to be displayed from the selected member records. This can be any or all of the information from the Member Record. For example,

- Top Line – MEMBERSHIP NUMBER
- 2nd Line - SURNAME
- 3rd Line – AGE
- 4th Line – JOIN.DATE

The type of information to be displayed will depend on the purpose of the Query and the output destination to be used.

Break

The **Break** field determines whether there will be a break when the displayed data changes value. If using Query for the first time select **N** for No Break on each line to avoid confusion. As the user becomes more competent using Query they will begin to use the Break option.

Using Totals

Total

The **Total** field allows the user to have a numerical total at each break. However for data that is not numerical, the system will not be able to count it unless a 'Counter' field is included in the display query fields.

The screenshot shows a 'Query Definition' window. It has a table with columns: Display, Break, Total, and an empty column. The rows are defined as follows:

Display	Break	Total	
SURNAME	20 Y	N	Text
COUNTER	10 N	Y	Number

Below the table, there is a 'Report Width' field set to 31. At the bottom, there are buttons: Accept, Clear, Special Select, Updates, Save Query, Load Query, and Fields.

Query Definition screen –break & total

The Counter simply counts one for each selected record. Therefore if fifteen records are selected, each one will have a count of one, and if the Total field is selected to Y, the system will add up all the counts of one and show fifteen as the total.

The screenshot shows a 'Query results' window titled 'SB+'. It displays a table with two columns: Surname and Counter. The data is as follows:

Surname	Counter
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
Jones	1
	15

At the bottom, there is a status bar that says 'Page 1 from Column 1 - Cursor Scroll or Press <Enter> to Continue' and buttons for Continue, Cancel, PgUp, and PgDn.

Query results screen

Similarly if the display is set to break on Jones and the results are output in summary form, the system will display as follows:

MEMBER		14:05:06	19 NOV 2003	Page 1
Surname	Counter			
Jones	15			
	15			
Page 1 from Column 1 - Cursor Scroll or Press <Enter> to Continue				
Continue	Cancel	PgUp	PgDn	

Query results screen

Note: the Total **Width** indicator is the total of all character spaces your selected components of information will use. This is important to ensure the display fits the chosen output media, for example, an A4 portrait page can fit 80 characters across, during an un-compressed output.

Accepting the Selection

When the query selection is complete the screen should appear as follows:

The screenshot shows the 'Query' window with the following details:

- Query Type:** Standard
- Select from:** Active
- Include Members With Invalid Addresses:** ☒
- Select Table:**

Select	Connective	Value	And/Or
AGE	Greater than	50	AND
JOIN DATE	Earlier than	1975	AND
- Sort Table:**

Sort	Order
SURNAME	Ascending
- Display Table:**

Display	Break	Total	
MEMBER NUMBER	13	N	N Text
SURNAME	20	N	N Text
AGE	3	N	N Number
JOIN DATE	15	N	N Date
- Report Width:** 54
- Buttons:** Accept, Clear, Special Select, Updates, Save Query, Load Query

Query Definition Screen

When satisfied with the query selection and display criteria select **Accept**.

When the screen is accepted a screen is displays that allow refining of the query and the output destination to be chosen. To continue with this process, jump to "Data Output Details" on page 21. The following are more advanced options found on the main Query Definition screen that can be used when the user is comfortable with a simple query.

Special Select

This option, located at the base of the Query allows the user to restrict the selection to within one or more member, Branch, Income Source or Employer records.

The screenshot shows the 'Special Select' dialog box with the following details:

- Warning Icon:** A yellow triangle with an exclamation mark.
- Title:** Choose field for special selection
- Buttons:** Member, Branch, Income Source, Employer, Quit

Special Select screen

Simply select the relevant option and specify the records to include.

Saving a Query

If the same Query is to be used again it is sensible to save the selection criteria for future use. This is particularly important for complex queries and also for comparison reports for different dates.

To save a Query select **Save** at the base of the Query Definition screen. When selected the following window is displayed to allow the user to define the save query description, category and accessibility.

Save Query Window

Name & Category

Create a Save name that compliments the existing Query save structure. This also involves assigning a category that has already been created by the system administrator

Security, Status & Department

Limit the access for running this particular Query in accordance with NUT policy and procedures

Menu Name

The Query should be saved within a menu to enable restriction of access and topic grouping

Protect Selection

The Query definition can be protected from amendment by the user running the query. The options are **Y** to fully protect the selection criteria, **P** for partial protection or **N** to allow amendment

Protect Destination

The destination of the query may need to be fixed to force output to screen or data file. To protect the output destination select Y for yes.

Write Protect

The Write Protect box can be selected so that only the user who created the query or ROOT level users can overwrite it.

Web Enable

If the saved query is to be available for users to run via internet access tick the box.

Note: Categories and Menus can be created from within their respective options on the Query main menu. To ensure an appropriate structure new categories or menus should be created by your System Administrator.

Load Query

This option allows the user to access and run a previously saved Query. There may be some access restriction for users regarding this facility. If a saved Query

is loaded, and then saved under another name, the system will be to delete the original unless it contains security restrictions. Please refer to “Load” on page 25 for further information.

Updates

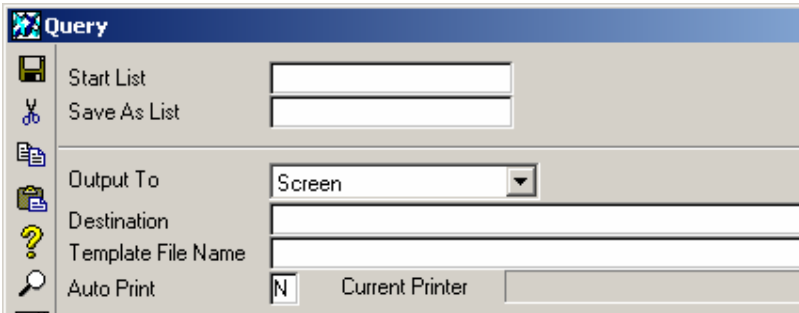
This option displays when a saved query was originally created and by which user. It also displays when the Query was amended.

Clear

This option simply clears all the information within the screen and allows the user to define a query from the beginning.

Data Output Details

When the select and display information is accepted a screen is displayed that allows the user to refine the query results and specify the output.



Query Output screen

Start List

The Start List field enables the user to select data from a previously created Select List, please refer to “Select Query” on page 31.

This facility is normally left blank for a standard query.

Note: unless a Select Query Type was selected in the Query Definition screen, the cursor will default past the **Save as List** to the Output To field.

Output To

The Output To field enables the user to identify which method is to be used to output the data. By selecting the drop down menu a range of options are available. Select the valid and appropriate option. For training purposes select **Screen**.

Note: If any output media other than to an ASCII file is selected, the cursor will default past the **Destination** field. This is due to the Destination field’s purpose of exporting the data to a particular drive and file on the server. The local system administrator will determine the need to complete this field.

Template File Name

If the output method is Word Mailmerge the system must have the mailmerge template entered in this field.

Auto Print

If the output method is Word Mailmerge this option can be set to automatically print the document when the data is exported to the data source. Please note that this feature needs to have the destination printers set up to be compatible with the membership system. Before taking this option please contact the local system administrator for guidance.

Output Results Options

The screenshot shows a software interface titled "Query Output screen". It features a list of settings on the left, each with a corresponding icon and a value field. The settings are: Sample Size (empty), Confirm (Y), Suppress Detail (N), Double Space (N), Replace VMs With (0), Log Usage (N), Update History (N), Mailing Id (empty), and Base Postcode (empty). To the right of the "Replace VMs With" field is a text box containing "No Replacements". Below these settings are three text input fields labeled "Heading", "Footnote", and "Footnote". At the bottom, there are five buttons: "Save", "Pre Process", "Updates", "Save Query", and "Load Query".

Query Output screen

- Sample Size

The Sample Size field allows the output of a specified number of the overall selection, for example the first 100. This is useful for checking the results before a complete data output.
- Random

When set to Y the Random field interrogates the entire database and then selects at random the specified sample size. The time taken to complete the Query will depend on the size of the entire query selection. Unless a random sample is required always leave it blank.
- Confirm

The **Confirm** feature prompts the user after the data has been selected but before it is output. The prompt will give display the number of records selected. It is recommended to select Y in this field if in anyway unsure about the size of the query selection.
- Suppress Detail

Suppress Detail minimises the data results by only displaying the break lines which indicate the totals for the differing groups of information. It provides a summary of information rather than each line of data for every selected record. If detail is to be suppressed ensure that the break options are set correctly, please refer to “Using Totals” on page 16.
- Double Space

The Double Space field adds blank lines to the query results between every single record and total. It is recommended to be set to N unless blank lines are specifically needed.
- Replace VMs With (F3)

The Replace VMs With feature replaces the system’s standard delimiter for multi-value fields. For example a member’s address can be output as one multi-value field but the destination 3rd party software may not recognise the standard delimiter. Therefore they can be replaced by specifying a value marker to use in this field.
- Log Usage

For a standard query select Zero for No Replacements.

The Log Usage field is a facility that can be used to record when Queries are run. If **Y** is selected it will update the Query Log that it is located within Set-up/Administration. This is normally only set to Y for saved queries that are restricted and/or sensitive.

Update History

Update History will update the member's Correspondence History with a Mailing ID for all member records that have been selected by the Query. If this option is required a Mailing ID and Description must be specified. Unless the Query is for mailing purposes select **N** for no.

Mailing ID (F3)

The Mailing ID field is for use in conjunction with the above field. If required enter the appropriate the see your administrator for details. For training select Return twice to enter the next field.

Header

Footer

The text entered in either field will appear as a header or footer respectively. These fields are only normally completed when intending to output to screen or printer. For example enter **SAMPLE QUERY 1 'P'** in the Header field and **REPORT PRINTED DATE 'D'** in the Footer field.

When satisfied with the output selections select the **Save** option.

Note: Some field codes such as 'P' for page number and 'D' for date function within the footer and header fields. Contact APT Solutions Support for valid field codes.

When exporting data to ASCII files fields must be less than 126 characters. For fields in excess of 126 contact APT Solutions Ltd.

The Query System will present a screen requesting confirmation to run the query. Select Yes to run the query.

If the **Confirm** option is to **Y**, a prompt will display the amount of items selected and request to continue. Select Yes to output the results of the query.

The Query System will retrieve the requested data and output it to the specified media

Pre-Process

This is a technically advanced function that requires a process to be carried out before the Query runs. The System Administrator will be able to determine if this is a valid part of the Query process for the GMB.

Running a Saved Query

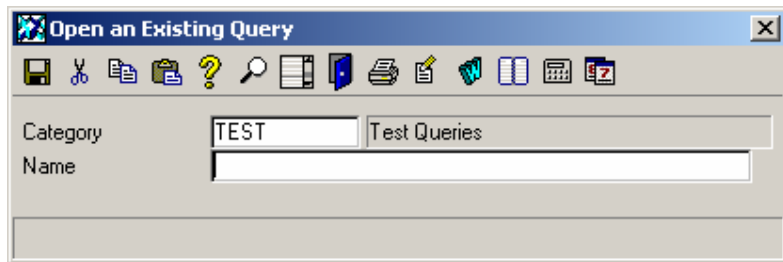
A previously saved query can be run from different areas in the Query module. It can be run from within the Query Definition screen, or from the Query main menu options, Run and Menus. The functionality of the Run and Menus options is very similar. Conceptually the Run option is used to find, and run, a query by category and the Menus option is to find, and run, a query using user defined menus.

If a query has been saved with a menu name, it can be run from the **Menus** option located on the Query main menu. To run a query from a menu, please refer to “Query Menus” on page 28.

If a query is loaded from the Query Definition screen by taking the **Load** option, it is amendable in accordance with its security settings. If it is run from the Query main menu, by taking the **Run** option, the selection criteria is none amendable regardless of its security settings. The other main difference between the two options is that the Load option only displays queries for the selected data set. Where as, the Run option allows the user to run saved queried regardless of data set.

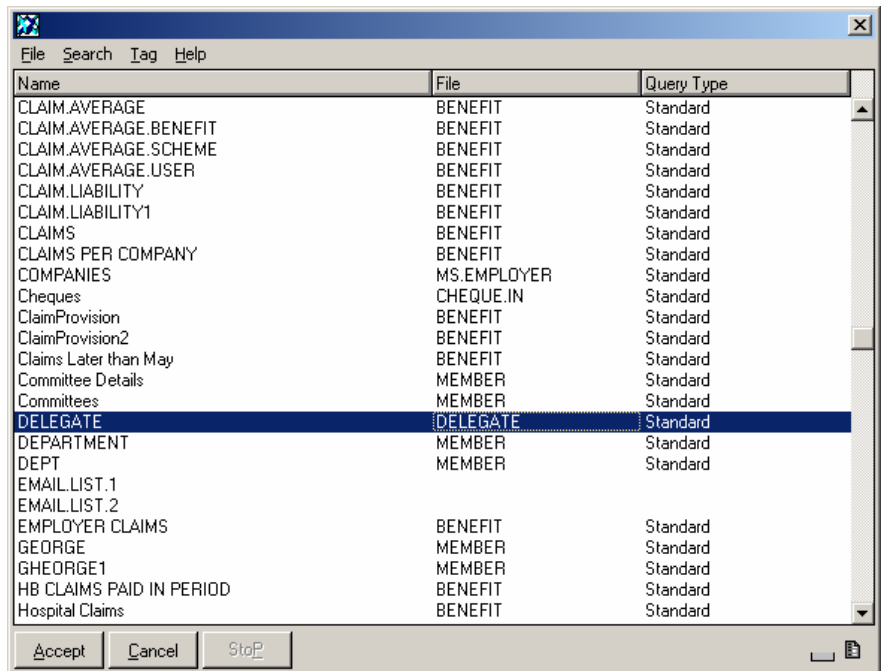
Run

When the Run option, located on the Query main menu, is taken the following screen is displayed.



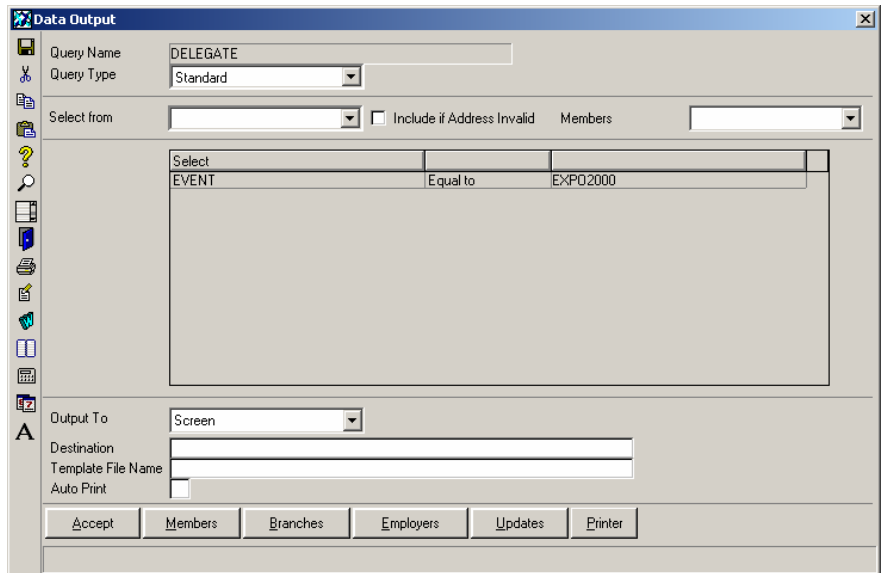
Load Query screen

The user can enter a category to only be presented with queries that have been assigned the selected category. Alternatively they can select Return through the category field to be view a list of all saved queries. When within the Run option, the list will be for all saved queried regardless of data set and therefore may be extensive:



Saved Query List

Highlight the query to load and select **Accept**.

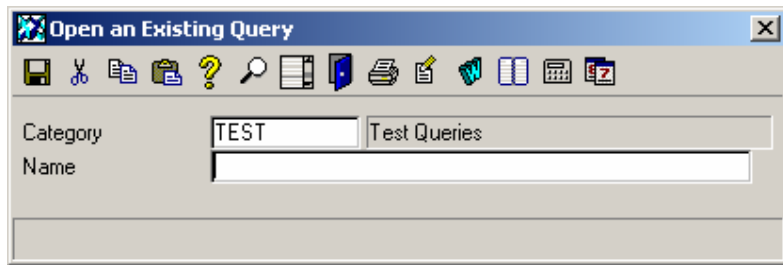


Query Data Output screen

The output details for the query can then defined by the user. For output explanations please refer to “Data Output Details” on page 21. When the Query is complete the user will be returned to the Query main menu.

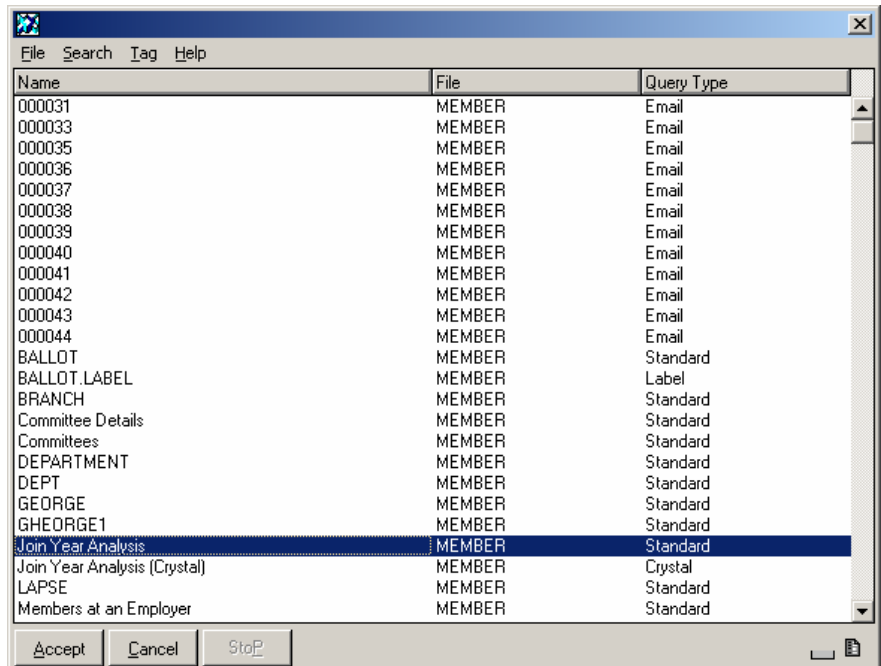
Load

When the Load option, located at the base of the Query Definition screen, is taken the following screen is displayed:



Load Query screen

The user can enter a category to only be presented with queries that have been assigned the selected category. Alternatively they can select Return through the category field to be view a list of all saved queries. When within the Load option, the list will only show saved queries for the selected data set:



Saved Query List – Member data set

Highlight the query to load and select **Accept**.

Query

Query Type: Join Year Analysis

Select from: Include Members With Invalid Addresses: ☒

Members:

Select	Connective	Value	And/C
JOIN YEAR	Higher than	1990	AND

Sort	Order
JOIN YEAR	Ascending

Display	Break	Total
JOIN YEAR	9 Y	N Number
COUNTER	10 N	Y Number

Report Width:

Query Definition screen

When the saved query is displayed it can be amended and output in accordance with its security settings and as defined by the user. For information on running a standard query please refer to “Standard Query” on page 11.

Query Menus

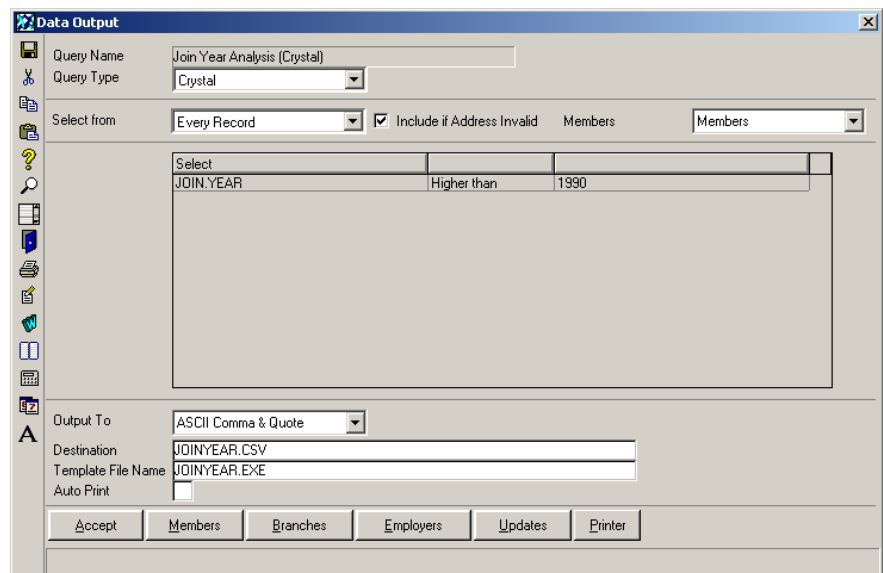
Within the Query System there is a facility to build up menus of existing queries that can be accessed and run by users who have limited knowledge of the Query module.



Query Menu Screen

Saved Queries are available from the Menus button, located on the Query main menu. To select a query, expand a menu and double click the query.

Note: The Query Menus are security controlled so that queries can be restricted to a department or an individual. Users do not see queries that are restricted from them.



Query Data Output screen

The output details for the query can then be defined by the user. For output explanations please refer to “Data Output Details” on page 21. When the Query is complete the user will be returned to the Query main menu.

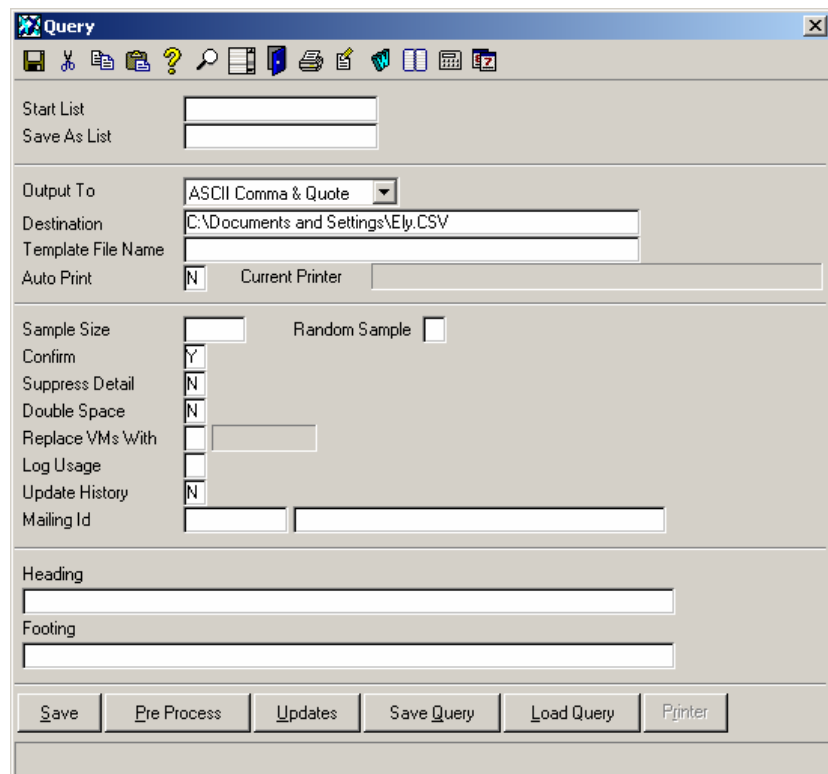
Output to Microsoft Access

The Query System allows outputs data quickly and simply to Microsoft Access using the Microsoft Access Query Type. The process is similar to a Standard Query but restricts the output details to an output format that it is compatible with Access.

To output to Access carry out the query definition, sort order and display details as per a “Standard Query” explained on page 11).

The Output To field will auto populate with ASCII Comma & Quote and the Destination field will only allow the user to enter a file path that ends in a .CSV extension. This ensures the data output file is in a compatible format for Access. The remaining fields are as per a Standard query.

Note: some output fields are invalid for this type of query.



Output screen to Microsoft Access

Select **Save** to create an output CSV File.

Note: Microsoft Access can be set to start automatically. For this and other set-up issues refer to the local System Administrator.

Select Query

The **Select** option in the Query Definition Screen allows the user to save query results for future use. It differs from the Save Query option, in that it saves the results of a query rather than the actual Query itself.

When a Select Query is run, the system identifies records based on the selection criteria and creates a list of those records. The list is saved with a user defined name that can be used with future queries.

Important: it should be noted in this instance “results of the query” means the records selected by the specified criteria, not the actual data contained within the records. For example:

If ten member records are captured during a select query because the member’s age data is equal to 40 they will always be part of the Select List because they were aged 40 when the Select Query was run. They will remain part of the Select List even when they are aged over forty and the data within their record has changed. Similarly others members may now be forty but will not be included in the Select List because they were under forty when the Select List was run.

Any further query on, or use of the Select List, will use the current data within the member record.

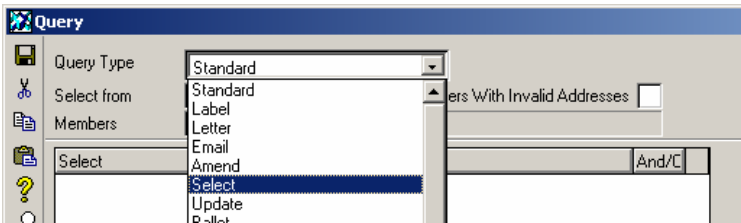
The Select Query can also be used as a tool to carry out complex queries.

Complex Queries

If a user has a very complex query and they do not interrogate the database in a logical and structured way, the results may not be exactly as they expect. By using the Select option the user can divide their query into digestible pieces and check each selection step for the desired results.

Select Query Operation

To run a Select Query, enter the Member data set as described in “Running a Query” on page 4 and then choose the Select Query Type.



Query Definition screen

Query Type

To perform a Select Query, choose the **Select** option and complete the Query Definition screen as described in “Standard Query” on page 11.

Note: the Select Query creates a list of records for future use. Therefore the Display fields are redundant.

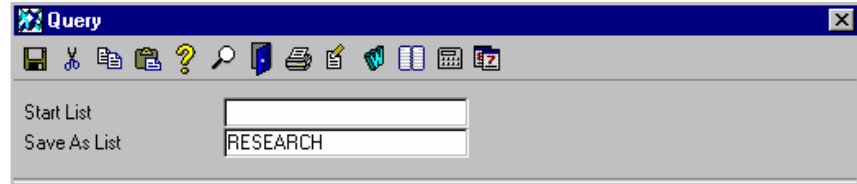
When satisfied with the query definition, select **Accept** to display the Query Output screen. As the purpose of the Query is just to create a select list, the majority of output options have no effect.

Start List

If the purpose of the Select Query is to create a select list based on a previously created select list, the original select list name must be entered in this field. Ignore this field for new select lists.

Save As List

This field creates the name of the select list.



Query Output screen

Complete the remaining fields as per a “Standard Query” on page 11 and select **Save**.

The query will run and the results will be saved under the specified List name. As there is not any data to output, results are not displayed. The list of records can now be used for further queries and reports by using the select list name.

Note: the data contained within the selected records can be updated after they have been added to a select list. The details of the members on select lists can change.

Using a Select List

When a select list is created it can be used in any future query. All the normal query functions can use a select list. It can be used to produce correspondence, generate reports, carry out analysis etc. The select list can be used as a definitive list to perform a function or it can be used as a starting point for further selection.

If the select list is to be used as a definitive list, for example a list of members to receive correspondence, further selection criteria is not required. In this instance the select criteria can be left blank. The user only needs to complete the order and display options, and the Query Type output details. If the select list is to be used for further interrogation or selection a Standard Query screen can be completed screen as shown here:

Select	Connective	Value	And/C
AGE	Equal to	58	AND

Display	Break	Total
ADDRESS	30 N	N
AGE	3 N	N
SURNAME	20 N	N

Sort	Order
SURNAME	Ascending

Query Definition Screen

When satisfied with the query select **Accept**. This will display an output screen related to the chosen Query Type. For explanation purposes a Standard Query screen is described here.

Start List: RESEARCH

Save As List:

Output To: Screen

Standard Query Output screen

Start List

This data is current at the time of extraction from the system

When presented with the Output Definition Screen, enter the select list name in the Start List field. This will limit the query to those members that are on the select list.

Complete the Output Definition Screen by inputting the same selections as a Standard Query (refer to “Data Output Details” on page 21) and then select **Save**.

The extracted data from the Select List will then output to the chosen media.

Letter Query

For further information regarding Standard Letters please refer to the Communication user guide

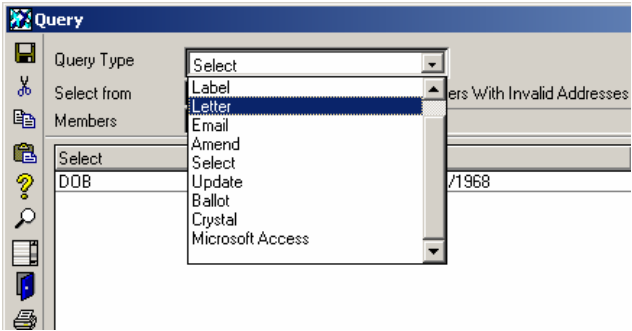
The Query module using a Standard Query Type can produce a data file containing correspondence details that can be used as a data source for large mailings. The Letter Query has the added functionality of combining the exported data file with an existing system Standard Letter.

The Letter option allows the user to Query the membership database for the purpose of sending correspondence to particular members. This option combines the selection functionality of Query with the standard letter functionality of the Communication module. This Query process can automatically update a member’s history with the correspondence.

A typical task to perform with this Query Type is as follows:

“I want to create a list of active members who currently pay by cash or cheque so I can send them a letter with the option to pay by direct debit. I want to be able to mail merge my list within my word processing application and record on my database who has been sent the letter.”

To perform a Letter Query select the relevant option in the Query Type field.



Query Definition screen

Complete the query selection criteria as described in “Standard Query” on page 11.

Note: Sort and Display fields are redundant for Letter Query

When satisfied with the selection criteria select **Accept** to display the Letter Output screen.

Letter Query Output

The Letter Output screen enables the user to determine the output characteristics and which Standard Letter to use.

Letter Output screen

Confirm

The Confirm option has the same function as in other query type options. It displays how many records are selected before the system exports the data. It is recommended to select **Y** for yes.

Start List (F3)

The Start List field has the same function as in the Select Query option, refer to “Using a Select List” on page 33.

Letter Code (F3)

The Letter Code field determines which letter is to be sent to the members.

Letter Method (F3)

The Letter Method determines the way the letter is printed. The system has the following options:

Don't Print (D): this will add the selected members to the associated letter run.

Print (P): this will print directly from the system to a network printer and is **not** recommended for the GMB.

Mailmerge (M): this option will update a mailmerge document's source file with the selected members' data. If the user calls the word processor the mailmerge document can be printed immediately.

Letter Date (F3)

The Letter Date field defaults to the current date but other dates can be entered. It is recommended to enter the date used in the letter text.

Destination

The Destination field should populate based on the standard letter set up. If not sure which destination to use for the mail merge data file, contact the local system administrator or APT Solutions Support.

Call WP

The Call WP field allows the user to automatically start their word processor application. This option is only valid when the Letter Method is mailmerge.

Auto Print

The Auto print field enables the user to automatically print a mailmerge document. This option is parameterised and needs to be setup before it is operable; please refer to the system administrator for further information.

When you are satisfied with the Letter Query output details, select **Save**.

The Letter Query process will complete in accordance with the output details. Unless the Letter Method is Don't Print, the system will ask for confirmation that the letters have printed out correctly.



When satisfied with the print process, select **Yes** in the Confirm Screen. Those members who have been selected by the Letter Query will have their Correspondence History updated to indicate that have been sent the letter.

Label Query

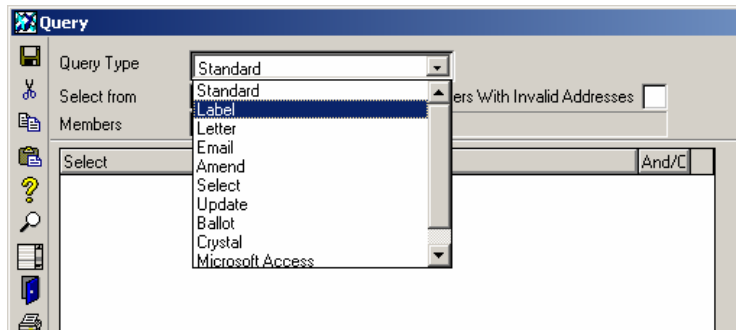
The Label option allows a user to query the membership database to produce labels for the purpose of sending correspondence. This option automatically produces labels that can be exported directly to a network or local printer.

The Label Query is primarily designed for large label print runs without using a 3rd party word processor application. The functionality in Label Query is largely superseded for the majority of organisations that use Microsoft Word or similar software package as their label design tools.

A typical task to perform within this option is as follows:

“I want to be able to produce and print a particular label for marketing purposes to be sent to all active members and contacts that live in Greater London.”

To begin the above task enter the required data set and select the Label Query.



Query Definition screen

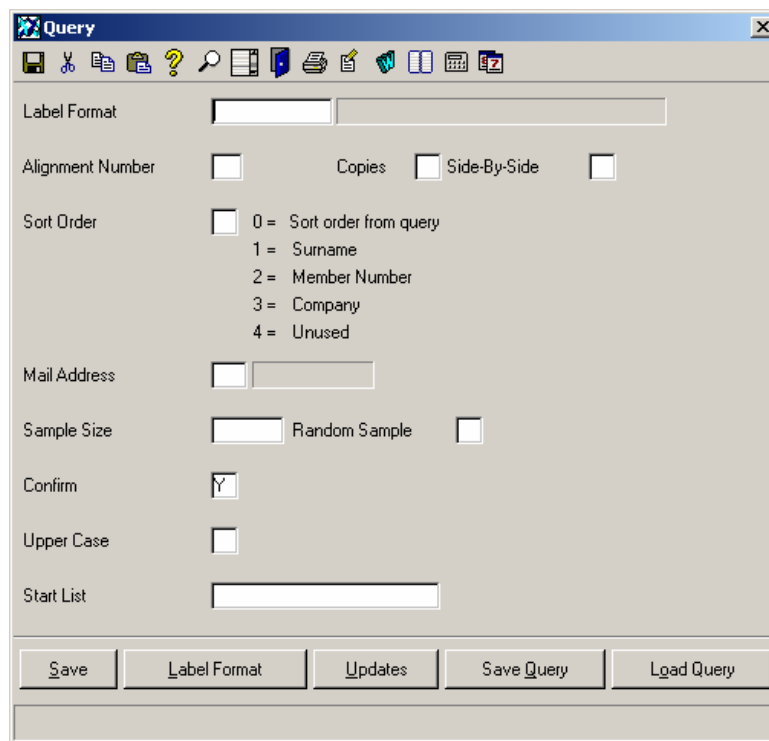
Complete the query selection criteria as described in “Standard Query” on page 11.

Note: Sort and Display fields in this screen are redundant for Label Query.

When satisfied with the selection criteria select **Accept** to display the Label Output screen.

Label Query Output

The Label Output screen enables the user to determine the printing characteristics and which Label Format to use.



Label Output Definition Screen

Label Format (F3)

The Label Format field provides a range of label templates to use. As facilities will vary between Regions the correct label sizes must be used.

Alignment Number

The Alignment Number field is a facility that allows the user to line up their label data by carrying out a test print. If zero is selected the main print run will begin without a test print. When not sure which number to select, contact the local system administrator.

Copies

The Copies field allows the user to determine how many copies of the labels are produced. If **1** copy is selected number the cursor will continue to the Sort Order field.

Side-by Side

The Side-by-Side field becomes relevant when 2 or more copies of labels are required. For identical labels printed adjacent to each other, select **Y**. To print each label copy separately in the correct order within its List, select **N**.

Sort Order

The Sort Order field enables you to choose the order your labels are printed. For example, you may wish to print your labels alphabetically by surname or alternatively by membership number. If you are not sure simply choose the option you require from your intuitive help (F3). For this exercise select **Surname**.

Mail Address (F3)

The Mail Address field allows the user to determine the type of address appears on the label.

Sample Size

The Sample Size field is identical to the equivalent field for "Standard Query" on page 11. This field will print a required amount of labels and, using the **Random** field, allows them to be selected randomly.

Confirm

The Confirm field enables the user to check the amount of labels to print before continuing.

Upper Case

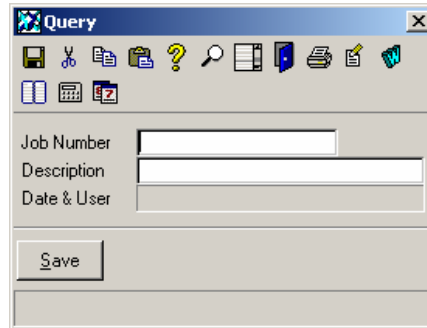
The Upper Case field will, by selecting **Y**, change all the data printed on the labels to upper case. To use the data as it appears on the membership database, select **N**.

Start List (F3)

To limit the label print to a select list, enter the select list name.

When satisfied with the label output options, select **Save**.

When satisfied with the number of selected records, select Yes through the next screen, until presented with the following screen requesting a job number and description.



Job Number screen

Job Number

This field allows a Job number to be printed on the first label. If the first label is not reserved for job reference data leave this field blank.

Description

The description can also be printed in the first label along with the job number.

Select **Save** and proceed in accordance with GMB policy and procedures.

Label Format

The label formats are designed to be used for mail shots and mass mailings by all departments. Therefore the set-up and amendments of labels format should only be carried out in consultation with the system administrator.

Label Formats

Label Type: Description:

Across: Page Left Indent Gap Between Labels Label Width
 Down: Lines Per Label Lines Between Labels
 Labels: Labels Across Page Labels Down Page

Print Method: ☒ Page Top Gap Mailsort Change First/Last Label ☐

Ln	Data Element	Len	Pad	Data Element	Len	Pad	Data Element	Len
1	MAIL.NAME	30						
2	ADDRESS1	30						
3	ADDRESS2	30						
4	ADDRESS3	30						
5	ADDRESS4	30						
6	ADDRESS5	30						
7	POST.CODE	10	2	LAPSED	10	2	MAILSORT.CODE	10

Label Formats screen

Please refer to the Mailing module user guide for information regarding label and mailing setup.

Email Query

The Query System has the facility to run a Query and send an email to those records that are selected. This facility utilises the local email client and allows the user to send individual or group Emails. For individual emails, it is recommended that the Outgoing Email correspondence option is used within a member's record. Please refer to the Membership user guide for further information.

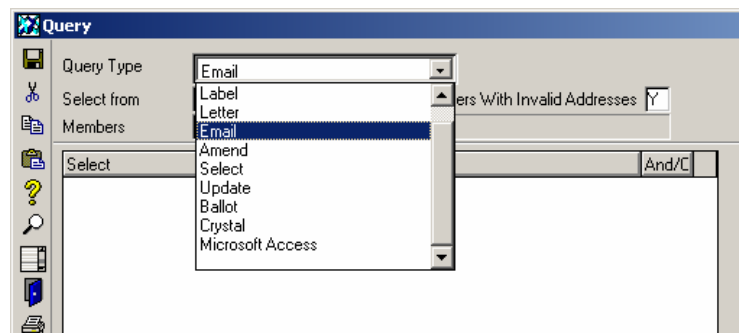
If Email Types are valid and the data is accurate the user can specify which address to use. If not, the Query will send an Email to the address that appears first on the member's email address list.

It should be noted at this time that there are security and logistical problems with Emailing large numbers of people. Although the system has the facility to support mass emailing it is advisable to contact the system administrator to determine the internal and Internet Serve Provider (ISP) guidelines.

The Membership System can limit the number of Emails to be sent and, or restrict the viewing of addresses. The user's Email client, such as Outlook, normally generates one identical Email to several people by having their addresses in the "To" field. This means that one Email is sent locally, it arrives at the ISP and the ISP sends an Email to each address in the "To" field. This is advantageous for speed of Email output but each person receiving the Email can see the other addresses to which the Email has been sent.

Alternatively if to restrict the viewing of Email addresses, only input one in the "To" field. This would mean one email for each person selected being sent from the local Email client to the ISP. This can be a slower data intensive process that the GMB or the ISP may not approve of. The Membership System supports both methods.

The Query Definition screen for an Email query should be completed as for a Standard Query except that the Query Type is set to **Email**; refer to "Standard Query" on page 11.



Query Definition screen

Note: the Sort Order and Display fields are redundant for Email Query.

Email Query Output

The Query Output screen enables the user to determine the output characteristics and email content.

The screenshot shows the 'Email Query' window with the following fields and values:

- Addresses Per Email: 1
- Subject: Holiday Template
- Attachments: \\My Documents\\Word\\Admin\\Holiday Application Template.doc (0 Bytes)
- Sent By: (empty)
- Email Addresses: H Home, W Work
- Start List: DOB20081968
- Sample Size: (empty)
- Random Sample: N
- Log In Correspondence: Y

The email content preview shows:

Dear staff

Please find attached the new holiday template.

Miss Marple

Administration Secretary

Email Output screen

Addresses per Email

- To send the Email to each member and restrict the viewing, so that members can not view other email addresses, enter 1 in the **Addresses per Email** field.
- For faster processing of Emails where security of email addresses is not an issue, enter a figure of more than 1 in the **Address per Email** field.

The second method will vary the amount of Emails sent to the ISP. It will depend on the number entered in the Addresses per Email field, and the number of records selected in the Query. For example:

- 100 records selected in you Query and 2 entered in the Addresses per Email field would cause 50 Emails to be sent from the local Email client to the ISP each having 2 addresses in the "To" field.
- 100 records selected in the Query and 25 in the Addresses per Email field would cause 4 Emails to be sent from the local Email client to the ISP, each having 25 addresses in the "To" field.

Subject

Enter the **Subject** to be included in the Email header. Whatever is typed here will be included in the member correspondence history and as the subject in the email header.

Attachment (F3)

If the Email is to include **Attachments** enter the path of where the Attachments are stored and its filename and extension. F3 will allow the user to browse the network and locate the file.

Email Addresses (F3)

Enter the Email Types in the **Email Addresses** field. The system will look for the first email address type and then, if the member does not have an email address of that type, it will look for the second email address type specified in this field etc. If a member selected in the query does not have an email address, the system will not generate an email and consequently not update their correspondence history.

Start List (F3)

To limit the label print to the select list, enter the select list name. Please refer to “Using a Select List” on page 33.

Sample

The Sample Size field allows the output of a specified number of the overall selection, for example the first 100. This is useful for checking the results before a complete data output.

Random

When set to Y the Random field interrogates the entire database and then selects at random the specified sample size. The time taken to complete the Email Query will depend on the size of the entire query selection. Unless a random sample is required always leave it blank.

The free text field allows the user to enter the main text of the Email.

Note: please refer to the local system administrator for email disclaimer details.

Sending Emails

When the **Send** button is used the system will prompt to run the Query. When **Yes** is selected the Query will run and select the records ready for Emails to be sent. When satisfied with the Query count select **Continue**.

Note: If the email client is not already running the system will attempt to load it.

When the emails have been sent a report is produced that displays the members to whom the email has been sent, and the people who were selected but not sent an email due to not having an email address on their record.

Troubleshooting

The Query module, as in all the modules in the Membership system, has a support system designed to overcome any problems. The local system administrator is fully trained and should be able to answer the majority of questions that users encounter when they first begin to use the system.

This troubleshooting guide contains some common problems, that other mere mortals have experienced, and their solutions.

Standard Query

Download to Excel, no data downloaded.

This is a problem with the word processing parameters within the Membership System. Please contact the local technical support to resolve the problem.

Download to Excel, error 'file not loaded completely'.

When this error message occurs, select return again to give another error message. This Excel glitch is usually due to receiving too much data from the membership system causing all the cells in Excel to be used up. Due to the Excel limitations the system query will need to be re-defined.

Select Query

Select Query outputs totally corrupt data!

Ensure that you have completed any other previous queries before beginning the Select Query. If you have changed your mind on the type of query and changed to a Select Query, there may be query definition fields or output fields completed that contain data in screens that are no longer valid. Therefore when data is entered in the Select Query Output screen, the system does not know which data to use and the output will be corrupted. To ensure this never occurs simply return to the Query System Main Menu and then begin the Select Query again or select Clear at the base of the Query Definition screen before beginning a new type of query.

Letter Query

Word Errors when trying to mail merge the data.

This occurs on some versions of Microsoft Office where the text file exported from the system has a **.TXT** extension. To resolve this issue, rename the text file to be exported to a **.DOC** and update the word document mailmerge setup.

Glossary of Terms

ISP

Internet Service Provider - this is the external organisation that provides all your email and internet facilities

Arithmetical Directive

This is merely a number or numerical text that defines parameters for the second data field to work to or between

Data Fields

Areas of your screen where you can add an input that will determine or initiate a query. They are also used so you can input text to determine your output data characteristics.

Invalid Address

This is a yes or no flag on the members record that can be determined by the system administrator. It is usually set to Yes if mail has been returned during a previous mailing from the addresses where members do not now live or use.

Mail Shot

A mass distribution of letters or correspondence that can be either specifically or randomly sent.

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